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ABSTRACT

This handbook is intended to help advocates for persons with disabilities organize for advocacy, build effective coalitions, frame key issues, package critical information, and use the media to advance the cause. Individual sections address the following topics: how to change public policy; myths about advocacy; what makes politicians tick; personal ingredients for effective advocacy; rules for effective advocacy; networks; building coalitions; the creation, care, and feeding of coalitions; framing the issues; understanding the legislative process; how a bill becomes a law; steps for success; legislative hearings; letter writing; tips on writing to legislators; electronic mail and facsimile messages; telephone calls; continuing communications; the legislative workshop; state advocacy; accessing and using the media; media strategies; media relations/public relations; and media presentations. A glossary and bibliography are attached. (Contains 25 references.) (DB)

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# Handbook for Rehabilitation Advocacy

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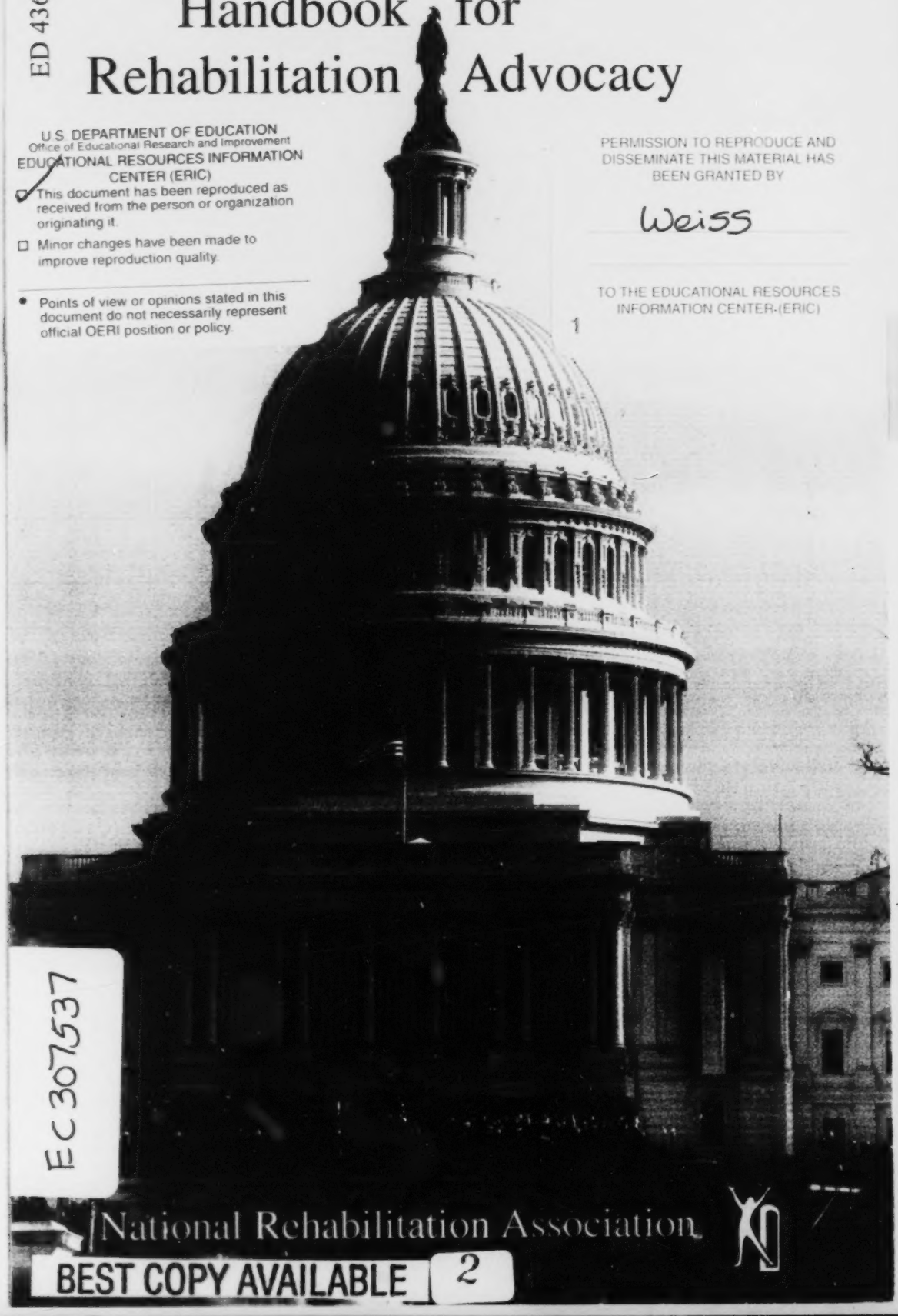

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# Our Mission

The National Rehabilitation Association is a member organization providing opportunities, through knowledge and diversity, for professionals in the fields of rehabilitation of people with disabilities.

# Handbook for Rehabilitation Advocacy

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*"I believe that the essence of government lies with unceasing concern for the welfare and dignity and decency and innate integrity of life for every individual."*

*Lyndon B. Johnson 1972*

# What This Handbook Can Do For You

*There is no cause so sacred as the cause of the people. There is no idea so uplifting as the idea of service to humanity.*

**Woodrow Wilson**
**1912**

NRA members have been instrumental in shaping American rehabilitation policy for over 70 years. As the oldest and largest rehabilitation organization in the country, the NRA name carries a great deal of weight in state capitals and in Washington, but our name alone cannot ensure passage of positive and progressive rehabilitation policies. Our legislative success has always and will continue to rely on our highly committed and motivated members at the grassroots level to press for meaningful rehabilitation policies.

This handbook will help you channel your drive, strength, commitment and knowledge of the rehabilitation field into effective advocacy efforts. The *Handbook* includes background and technical information to help you implement reform. It describes the history and evolution of the current program and explains other successful advocacy efforts so that you can draw on them in planning your own.

Although policymaking is an erratic process, with the players and politics constantly changing, the basic tools for advocacy never change. These tools, which include knowledge of the legislative process, effective communication skills and accessing the media, are fully discussed in the *Handbook*. The *Handbook* illuminates what motivates elected officials, what catches their attention, and what makes them respond.

It demystifies policymaking so that you understand influencing the outcome is within your power.

This handbook then helps you organize and prepare for advocating in the interest of persons with disabilities. It offers advice on building effective coalitions. It teaches you how to frame the key issues, and how to package the important information. And it helps you understand how to use the media as a tool to advance your cause.

Feel free to use sections of this handbook in your own efforts. Where the material suits your needs, copy it directly or change it in any way that does not change the accuracy or truthfulness of the content.

Most importantly, stay in touch with the NRA national office, and with your NRA state chapters and divisions. Do not reinvent the wheel unless you have to. Take advantage of the materials others have developed, the data on which they relied, and the tactics they devised to achieve success. In turn, keep others posted of your progress and share what you learn with others.

Send copies of the printed matter you develop in your campaigns for advocacy to the NRA so they can be incorporated into advocacy support and training materials. Consider this handbook to be a living document to help us create a more productive and fulfilling nation for persons with disabilities.

## What This Handbook Cannot Do For You

Legislative bodies and individual legislators at the state and federal levels all have some things in common and some things that are unique. This handbook can offer general information and suggest common approaches. It can describe efforts that have succeeded in other places to achieve other reforms. But no publication can serve as a cookbook for public policy. There will be no precise formula for every situation you will encounter.

You should make a long-range plan for reform, and learn all that you can about the policymakers you target. But then you must stay open-minded and flexible. It is critical for you to be prepared to seize every opportunity that presents itself to further your goals.

Effective advocacy is an art. Most of what you will learn about it will come through on-the-job training. You might discover a lot from reading this handbook, but there is no substitute for practice and experience.

Effective advocacy is its own reinforcement. Sometimes you will work very hard and achieve very little. But sometimes, maybe when you least expect it, you will see things change. There are few greater rewards than the feeling that comes from knowing you have made a difference. But remember, you will never know this feeling unless you try.

# How to Change Public Policy

*The right of our fellow citizens to represent to public functionaries their opinion on proceedings interesting to them, is unquestionably a Constitutional right, often useful, sometimes necessary, and will always be respected...*

**Thomas Jefferson**

Social reform is an arduous process. To succeed, a reformer must be strong, dedicated, persistent and willing to work hard. But if you are willing to make the investment required, you can make a difference. This is the key to successful advocacy. There is no mystery about it. Victory will come to those who work hard and stay with it.

The reason this is true is that public policy is based on a simple commodity that is well within your reach -- information. The individual who has accurate, useful, well-packaged, meaningful and hard-hitting information can exercise great power in the policymaking arena.

You already have some of the information that you will need because it comes from your personal experience. You must be willing to share this very personal information with policymakers, so that they can learn what you already know, which they may have never had the opportunity to really understand.

Other information may not be familiar to you, but is well within your reach. Once you learn from where and how to gather the information you need, how to assemble the facts, and how to package and deliver the message, you are more than half of the way there.

Every policymaking body, from legislatures composed of elected officials, through regulatory agencies run by bureaucrats, to large companies managed by boards of directors, has its own process for decision-making and policy implementation. You must learn about the process, and about the people who control the system you are trying to influence. You need to discover what makes it work, where the intervention points are, who controls access and outcome, plus what and who determines the timing. You must delve into the system, form personal relationships and become a part of the process to produce change from within.

Understanding the process, developing good contacts, having good information and knowing how to use it is what advocacy is all about. This is why the experience you gain and the skills you develop in advocating for reform can be transferred to other activities at other levels. Once you realize that the system is open and accessible, and that it can be influenced to produce the right outcomes, you will appreciate how much power you have as a citizen advocate. If you are willing to work hard and use that power, you can make a big difference.

# Myths About Advocacy

*Never let the fear of striking out get in your way.*

**Babe Ruth**

**Myth: Advocacy is somehow a "dirty" business.**

**Fact:** Advocating social policies, working to correct what is wrong, is your responsibility and your right. Only those who do not understand how public policy is made could believe that citizens should not engage in advocacy. Wanting to leave the world a better place than you found it is admirable. If your cause is good, you should feel proud to advocate for it. It is the highest form of participation in an open democracy.

**Myth: Advocacy is for professionals.**

**Fact:** People who have been advocates for a long time have the experience and perspective that can only come with time. Advocates who are well connected, and who know their subject matter well, can be very valuable to legislators who are pressed for time, have small or no staffs and few other resources. Legislators have many demands on them, and often need to get good information they can trust very quickly. These are things that a good professional advocate can provide. But you too can provide good and trustworthy information. And you have valuable assets that professional advocates do not.

Citizen advocates are inherently credible in a way that professional advocates cannot be. When you advocate social reforms it is because you believe they are right, not because someone is paying you to do so.

You are also a voting constituent, and you represent an organization comprised of other voting constituents. This is a fact that politicians never forget. Your elected representatives hold office to serve you and your fellow constituents. They know that if they perform well, voters will keep them in their jobs.

**Myth: To be successful in advocacy, you have to "know someone."**

**Fact:** To be good at persuading anyone, you should know certain things about the individual. Fortunately, politicians lead very public lives, and it is easy to learn a great deal about them.

If members of your NRA state chapter or division already have personal contacts with officeholders, use them. There is nothing wrong with this approach, in fact it is recommended.

But if you do not already have personal relationships with the officials who will be important in achieving your goals, form them. Politicians like getting to know new people. If you can, arrange a "reception" or a legislative breakfast so your whole organization can meet and get to know your elected officials. Politicians seldom turn down invitations that give them access to large audiences.

# What Makes Politicians Tick

*The legitimate object of government is to do for a community of people whatever they need to have done, but cannot do at all, in their separate and individual capacities.*

**Abraham Lincoln**

Politicians have some common characteristics that make the outcome of advocacy efforts more predictable. Knowing these characteristics, and knowing how to take advantage of them, can improve your chances for success.

- **Politicians hold public office to help others.**

Politicians have chosen to apply their ego strength to public service. Most people run for public office to be in a position to help others. You should remember this when you approach your policymakers because you need the help that they can give.

- **Politicians like to be asked.**

Few politicians come to public office with a pre-formed personal agenda. Their platforms are usually comprised of issues they think are important to their constituents. Few politicians will reach out to correct a social wrong simply because it is there. Rather, they have to be made aware of the problem, and asked for their help in solving it. Get used to the idea that asking for help is a sign of strength, not weakness.

- **Politicians are good learners.**

By and large, politicians are fairly astute. Almost by definition, they have good people skills, "street smarts," and political acumen. In addition, as they serve in public office over time, they learn a great deal. Some of them become experts in particular fields. The best politicians continue to learn throughout life. Remember this when you formulate your plans, because to achieve success, there are important things you should teach policymakers.

- **Politicians do not know everything.**

Politicians must follow many different issues. Even the most astute and hardworking politician has to deal every day with issues about which he or she knows little or nothing. At the federal level, during an average session (i.e., one year of a two-year Congress), members are asked to cast between 500 and 600 votes. There is no time to become expert in all, or even in most of the areas these votes will cover. Therefore, good politicians are always open to good information. Once they find a reliable source for good information, they will take good care of it, and refer to it often.

- **Politicians have many demands on their time.**

Politicians always have more to do than they can get done. This fact offers several important clues for your approach to them. First, never waste a politician's time. Second, do not overload your elected representative with demands, but work to make his or her job easier. In other words, don't expect to sit back and let the politician work for you. You must help him to help you reach your goals. Third, since politicians must prioritize the issues they handle and will inevitably ignore those that fall to the bottom of the list, you must work to frame your issue as important and achievable.

- **Politicians do not have sufficient resources to meet the demands made on them.**

At the federal level, Members of the House and Senate have large staffs and large budgets, but they also have large constituencies to serve. In many states, elected representatives are expected to cover the same broad issues with no staff at all. This is why at the state level, good information, trusted informants and other outside resources are even more precious. The more you can do for those you ask to represent your issue, the better. If a lasting relationship grows out of your work on rehabilitation issues, so much the better.

- **Politicians are always running for office.**

Elected politicians have two very different jobs: running for office; and making policy while in office. Only one of these is indispensable. The fact that they serve at the will of the people makes politicians very responsive to their constituents. Therefore, try to see a politician with at least one voting constituent (i.e., a person from his home district). And remember that few politicians turn down access to large audiences of voting constituents.

- **Politicians respond to crises.**

Because of large demands and small resources, politicians seldom have the luxury of long-range planning. Rather, they respond to emergencies, disasters, and whatever is hot in the news. This phenomenon is sometimes called the 60 Minutes Bill. That is, on Monday mornings, politicians in state legislatures all over the country introduce bills to correct whatever crisis was featured most prominently on the Sunday night CBS show 60 Minutes. Your job is to portray the situation facing people with disabilities as a crisis, but one that can be easily remedied.

- **Politicians behave differently when they know they're being watched.**

This fact does not make politicians any different from the rest of us. It is included here to remind you of the importance of constant monitoring.

- **Politicians like to be thanked.**

This also does not differentiate elected officials from the rest of humanity, but it is sometimes too easy to forget. You should always express your gratitude when an official has helped you, even when the result is not in your favor. A thank-you is long remembered.

# Personal Ingredients For Effective Advocacy

*If you're going to play the game properly*
*you'd better know every rule.*

**Barbara Jordan**

Just as it is important to know the objects of your advocacy efforts, it is important to know, and to control, how you are perceived.

The cardinal rule for every encounter with every community leader, politician, and media gatekeeper is to be pleasant. Regardless of how you may differ on important issues, the personal impression you leave will determine whether or not you will be welcomed back. You always want to keep that option open.

Anger is a common reaction to the lack of support, including issues effecting persons with disabilities. But anger is not appropriate in your interaction with policymakers. If you cannot control the anger, cannot channel it into a more positive and productive emotion, you may not be the right person to advocate this issue.

Elected officials are used to being accommodated and they expect it. Be willing to show them deference. Even if you do not respect each politician personally, you should respect the office each holds. Belligerence will not only close doors to you, but will typecast your entire organization.

Be honest and straightforward. Because information is the commodity you trade, credibility is absolutely essential to

your success. Avoid half-truths that have even a chance of being misleading. If you lead a politician down a path where he gets ambushed, he will never deal with you again. Remember Mark Twain's advice: "If you tell the truth, you don't have to remember anything. "

Persistence is important in successful advocacy, but beware of crossing the thin line and becoming a pest. Basic courtesy should guide your actions. Be sensitive to the many different demands that are made on political leaders, and plan your advocacy efforts accordingly.

Always keep your message to your elected representative or candidates positive, creative, concise, and to the point. Legislators or their staffs are more likely to read a piece of correspondence that is positive, brief and full of facts than one that is negative in nature. Never, never, never, begin your correspondence to your representative with a negative statement such as -- "that's the stupidest vote you've ever cast". Most likely the first sentence of your correspondence would be read and your letter would either be discarded or put aside to receive attention when the staff and representative "find the time" (which usually means never).

Don't burn your bridges by alienating your representative or his staff. While a representative may not be with you on one vote -- he may vote exactly right the next time around. Remember that legislation -- such as funding bills (appropriations) -- must be voted on each year. It is vital that you have the ability to contact a legislator or his staff whenever you perceive a problem or to voice your opinion on a program.

Voicing your opinion does not mean saying no to everything. Most successful legislation is hard forged compromise between both political parties in the legislative body and the Administration (whoever is President at the time). if you don't

like something -- say so in a positive manner -- but also offer an alternative with facts to support your position.

# Rules For Effective Advocacy

Most of what a good advocate does is intuitive, and grows out of a few basic principles. What follows here is the core set of principles on which most advocates agree. Try to remember these rules when you become discouraged, entangled in detail or simply confused. They may help clear your head, renew and redirect your energies.

**1) Ask for what you want.**

For a variety of reasons, many people hesitate to ask for what they really want. Always hold in your thoughts that no Congressperson, no Senator, no legislator, no politician, no candidate for elective office knows what you are thinking unless you express your views to them. While they would like to feel that they are clairvoyant, they are not. Although they watch opinion polls, they are acutely aware that public opInion can change overnight. There is no place for hesitation in advocating for issues regarding persons with disabilities. If you do not ask, you will never get the results you seek. Do not be so pushy that you turn people off, but have the gumption to ask for what you need.

**2) Be ready to work hard.**

There is nothing magical about success in advocacy or success in politics. Victory most often goes to the one who works the hardest. As we will discuss later, coalitions can legitimize your efforts and provide a broad base of support. But there is no substitute for a small team of advocates willing to invest the time and energy necessary to change public policy.

### 3) Find a legislative champion.

Advocacy for any special interest breaks down into two parts: advocacy from the inside and advocacy from the outside. NRA staff and volunteers can plan, coordinate and implement the outside advocacy activities, but only a member of the "club" can handle the inside responsibilities.

One of the first things you must do is find a legislative champion who is willing to take up your cause with his colleagues. This special person should be:

- **ideally, in a leadership position, or holding a seat on a key committee, if possible, on a committee which has responsibility for disability issues;**
- **at a minimum, well liked by his peers;**
- **committed to the outcome you seek;**
- **willing to work on your issue, not just to vote right, but to really work the bill with his fellow legislators.**

Begin the search for this special person among the personal contacts and acquaintances of NRA members. Is there someone in the legislature who has a family member with a disability, or a background in working with persons with disabilities? Is there someone with whom NRA already has a good relationship? Someone who has championed NRA issues in the past?

If in the event your search does not turn up the ideal inside advocate, you will need to begin a relationship that will create one. Start with members of the legislative committees that will be key to success. Hopefully, you will find a special supporter with similar beliefs, but that individual must also be ready to stand up to stiff opposition. Once you have found

your champion, establish a good working relationship with trust as a key element, and follow that person's lead.

**4) Organize, coordinate, orchestrate.**

Plan as much as you can and leave as little as possible to chance. Once the legislative session starts, things can move very quickly, so coordinate carefully with your own troops, the members of your coalition, your legislative champion, and other key members and staff. Work to ensure that all your allies speak with one voice. (The time for thrashing out differences is before you approach the legislature.) Remember that elected representatives are most responsive to their own constituents, so always include voting constituents, preferably powerful and politically active ones, on your team.

**5) Touch all the bases.**

Talk with and solicit help from as many groups representing the interests of persons with disabilities as you can. Approach everyone with a vested interest in your issue. Remember that it takes resources to maintain secrecy. Since you will be advocating on a shoestring, do not waste time or effort trying to hide your plans from groups or individuals you think might oppose your efforts. To the contrary, you may find good allies in unlikely places. At the least, you might be able to neutralize some potential opposition. You will also learn what opposition is out there and be in a better position to deal with their objections.

**6) Stay flexible, be opportunistic.**

Long-range plans can provide good general guidelines for your advocacy efforts, but it is critical that you remain flexible and willing to fight. Remember that campaigns for advocating rights for persons with disabilities are like electricity: they do not exist without resistance. You must be ready and able to

move quickly, to respond to your opponents and to take advantage of opportunities to advance your cause as they arise.

**7) Keep it short & simple (KISS).**

Policymakers are almost always pressed for time, so it is a serious mistake to waste their time. You should be prepared to state your best case for the issues at hand in 30 seconds. You will have opportunities to discuss the issues in greater depth, but you should always strive to capture your audience's attention within the first few sentences. Always plan your presentations as if your audience will only remember one line from everything that you say. Decide ahead of time what that one line should be (think of it as the headline), and design your message around it. Keep your message simple, appealing, brief and to the point.

Any written documents that you leave behind should be concise and to the point. Material that fits onto one page has the best chance of being read. Attach backup and supporting information as appendices. When a legislator or a staff person wants more information, you can always supply it. But unsolicited lengthy documents have slim chances of ever getting read.

**8) Assume the perspective of others.**

Remember that policymakers hold positions of power. They are used to having a great deal of control over their surroundings and consequently, they often do not easily understand the difficulties persons with disabilities face.

Be patient and understanding in your approach to policymakers. Listen to the questions they ask for clues about their thinking. Remember that once you too knew very little about the issues regarding persons with disabilities. Work to fit what

you have learned through personal experience into the framework of persons who have never had those experiences.

**9) Build and preserve your credibility.**

This admonition means more than simply never telling a lie. It means that you should keep your legislative champion and your other allies fully informed, especially about the political climate that surrounds your proposed legislation. You should not mislead allies. Do not promise more than you can deliver. And, do not spring any surprises.

**10) Anticipate and deal with your opposition.**

People who will oppose may approach the issue from a different perspective, and they represent people with different interests. Do not take the differences between you personally, but do not ignore them either. See them as the challenge they are. Plan for opposition to your advocacy efforts and design ways to deal with it.

Use the contacts and personal connections you have to neutralize as much opposition as you can. Even where an organization formally opposes your goal, they might be willing to hold their active advocacy against it in check. But do not rely on a promise of passivity and be prepared to deal with antagonism. Have your own facts and figures ready. Work constantly to portray your bill not as another break for persons with disabilities, but as a civil rights issue, economic issue, etc.

**11) Talk the Talk and Walk the Walk.**

There are many ways in which most issues can be viewed. Especially, issues relating to individuals with disabilities. A liberal legislator may find it very comfortable hearing

the social welfare ramifications of a program and the inherent benefit to the whole of society. However, a more conservative legislator may be appalled at hearing that and want to know the success rate of programs which benefit people with disabilities, how many people receive benefits, the payback ratio in taxes paid by individuals with disabilities who are employed, and the overall cost to the taxpayer.

Do NOT make up falsehoods about your program, merely put emphasis on the facts a specific legislator you are contacting would be more comfortable hearing. There is a lot of research work in doing this type of advocacy, but it enhances the chance of positive rewards with legislation favorable to you being passed. It pays to do the homework.

**12) Be prepared to compromise.**

Because public policy balances competing interests, flexibility is essential. You should be prepared to negotiate, and have a fall-back position. Avoid show-downs. You run the risk of losing your credibility.

Remember that social policy is an evolutionary process. Change often comes in small increments. If you do not get all that you seek the first time you ask (and you probably will not), try to ensure that the work you do constructs a base on which you can build your future efforts.

**13) Never burn your bridges.**

Avoid making enemies in your advocacy efforts. Alliances shift in the public policy arena, and opponents on one issue become allies on another. Deal with your adversaries as you would like them to deal with you. Remember, in advocacy, there are no permanent friends and no permanent enemies.

**14) Target your efforts.**

Trying to persuade every single member of the legislature on your issue would be exhausting and wasteful. Some members will almost always support you and others will almost always oppose you. Focus your efforts on the key players (the leadership, relevant committee members and those with recognized expertise on disability issues), and the swing votes (those who begin on the fence but whom advocacy might move to your side). Do not forget your supporters. They just do not need as much effort.

**15) Honor the staff.**

Do not underestimate the importance of staff in a policy-making body. The members for whom they work trust and defer to them; you should too. Because they are free from political demands, including campaigning, staff often develop greater substantive expertise than their bosses. If they want to, they can be a tremendous help. Treat staff well. They also like to be thanked and kept well informed.

**16) Track your progress.**

Keep flow charts and checklists to monitor your progress. Once the legislative session starts, you will be racing the clock, so do not let the pace make you lose track of your issue. Avoid making a pest of yourself, but check in with your supporters often to make sure their position does not change. (Your opposition will be checking in with them. ) Keep a careful count of the votes you have and the votes you need. Watch the deadlines.

Do not force a wavering member into the opponent's camp by trying too hard to pin the person down. Learn how to accurately interpret statements that appear supportive on the surface but do not constitute a commitment. (e.g., "I'd like

to be with you on this one," or "I think you have a good case here. "). Also, try not to let a legislator commit against you.

**17) Be persistent.**

Few important social reforms are achieved the first time they are sought, so do not be discouraged by failure. Sometimes sheer persistence is what wins in the end, because each time a member turns you down he feels more like he owes you in the future.

**18) Follow up.**

Learn as you go by taking the time after the dust settles to ask questions. Debrief your allies to reinforce your strengths and shore up your weaknesses. Advocacy is an art form learned on the job, so work to get better at it as you go along.

Always remember to thank your supporters. It is not only the decent thing to do, but it will make them more willing to help in the future.

# Networks

Networks are a precursor to coalitions, but they can perform important functions much better than can coalitions. At its simplest, an advocacy network for persons with disabilities is nothing more than the commitment, communication and cooperation of individuals who share a dedication to the fair treatment of persons with disabilities.

Networks have no formal leadership structure. Rather, they are led by those individuals who have the energy, dedication and skills to reach out to others.

The best network members have most of the following characteristics:

- **a sense of personal mission that drives them (almost always related to a desire to leave the world a better place than it was found);**
- **a willingness to take calculated risks;**
- **integrity and trustworthiness;**
- **the persistence of a long-distance runner;**
- **a good sense of humor;**
- **a capacity for seeing things not as they are, but as they should be;**
- **spontaneity, flexibility and adaptability; or**
- **raw energy and the capacity to harness the energy of others.**

Successful networks operate at a high level of trust and reciprocity. They rely on a process of faithful exchange which builds and strengthens the more it is used.

Networks excel at developing and introducing new ideas. They perform best those tasks that require individual initiative, quick response, flexibility, risk-taking and moral intensity.

In forming your advocacy network for people with disabilities you should draw on your long-standing relationships and personal contacts, but you should also think expansively and creatively. NRA members are familiar with working with groups that serve the disability community. But there may be less obvious groups to tap as an ally which would give more strength to the network by making the issue more pervasive.

There are many places where you might find new allies on disability related issues.

All communities have leaders who affect public policy because they are powerful, well-liked, or both. Sometimes these leaders take a visible public role. But other leaders are just as influential in a much less obvious way. Advocates who really know their communities will know how to find even these more obscure individuals.

You should persuade the key players to be key participants in your campaign, but do not be concerned if they refuse. They might be willing to support your effort at a lower level or at a later date. The least you will have accomplished is advising them of your intentions and your goals, and hopefully, neutralizing any opposition they might have otherwise posed. In the end, the core members of your advocacy network for persons with disabilities, the real activists, will emerge naturally through their hard work and commitment.

# Building Coalitions

*Coalition building is the art of*
*thinking independently -- together*

**Alexander Meiklejohn**

Coalitions are alliances of organizations working together toward a common goal. Coalitions can be formal or informal, tightly or loosely organized. They can be temporary, created for only a limited purpose (such as marshalling support for a specific vote), or they can be permanent, dedicated to long-term, comprehensive reform.

While networks tend to be decentralized, coalitions are centralized and hierarchical. This is because the participants in a network speak only for themselves, but the participants in a coalition represent entire organizations.

In contrast to networks, coalitions provide organizational structure, institutional resources, visibility and respectability. Like networks, except in a larger and less intense way, coalitions harness and focus the energies of their constituents, and multiply their effectiveness in seeking social change.

The great strength of coalitions is their diversity. Some angles of disabilities issues may appeal more to one group than to another, but in general, it is better to frame the issue for broader, rather than narrower, appeal. However, including uncooperative groups in a coalition can be destructive. Successful coalitions are comprised of members who are willing to subordinate their own egos, and the conflicting needs of their individual organizations, for the common ultimate goal.

At the same time, a successful coalition respects the needs of its individual member organizations. Each organization should remain free to act and speak for itself outside of the coalition. No one should speak formally for the coalition on issues or positions that have not been cleared. But a successful coalition must have a management and decision-making structure that permits prompt, flexible and conclusive action.

Begin your coalition by forming an organizing committee to develop a detailed statement of principles and goals. Have members of the organizing committee recruit organizations. Plan a program for the coalition based on incremental steps - i. e., build in ways for your members to experience success. Focus clearly on a single target mission; don't scatter and spread yourselves too thin.

If you feel comfortable doing so, and if the formation of your coalition constitutes a news event, you can hold a joint press conference. This presents the opportunity to:

- **Publicly commit participating organizations - including their members and staff - to the coalition;**
- **Bring media attention that will convey the coalition's purpose and commitment; and**
- **Recruit other individuals and organizations.**

# The Creation, Care and Feeding of Coalitions

There are many ways you can advocate for rehabilitation as an individual. But your impact is multiplied when you join others.

Coalitions are delicate. They can be as fragile as a family and require the same loving care. At their heart is the willingness and ability to put aside individual differences for the sake of common goals.

Coalitions can create strength by uniting unlikely allies and bringing unexpected resources to your campaign. When large organizations with established reputations lend their stability and respect to a coalition, it allows the advocacy groups who are the backbone of the coalition to leverage their resources.

Coalition building should be an important prelude to your campaign for bettering the situation of persons with disabilities. Remember that coalitions do not just happen. They require planning, persuasion and constant communication. Natural organizational alliances will differ from one community to another, and will shift from issue to issue. As noted before, there are no permanent friends and no permanent enemies in advocacy.

# Framing the Issues

One of the most important precepts for success in both political and media advocacy is to understand and appreciate your audience. Regardless of how good your intentions are, regardless of how sure you are about the message you want to send, the only thing that really counts is the message that is received. If all your work fails to take account of the background and experience of your audience, and the context in which your message is heard, it could be for naught.

We are all bombarded with information. This is even more true for policymakers. It is literally impossible to pay attention to all the information that surrounds us. We filter and sift the information around us, and that protects us from becoming overwhelmed. But the filtering process can also prevent important information from getting through. No amount of effort can make a message work if it does not get through to people.

Designing your message to get through the mental filters of the audience is critical. So too is dealing with the information that already exists in the hearer' s mind. Information is never received in a vacuum. Rather, it enters and resonates (or competes) with an existing body of knowledge and experience. In developing your advocacy message, you should not begin with what it is that you want to say. Rather, you should begin by knowing what is already there. Then frame your message to take advantage of the existing knowledge. Framing means putting your information into a context. When done well, framing makes bare facts come alive. It personalizes abstract ideas, and illuminates their relevance and importance.

Everyone holds certain convictions and beliefs that can be evoked by your message. Though we are a very heterogenous nation, Americans resonate with surprising unanimity to a set of core public values: freedom, security, family, fairness, opportunity, and caring. When your message evokes these values, your audience is not only more receptive to the content of what you say, they actually become involved in it.

Resonating with your audience, or striking a responsive chord with existing values and beliefs, changes your audience from passive recipients of information to active participants in communication. This co-creative process is the highest level of persuasion. It gives your message high impact, and leaves your audience feeling involved.

Because of the electronic media, we live in the age of the 9-second media bite. This is not necessarily bad, it is simply a fact of modern life. It suggests that you should design your message to be short and to the point. Work hard to translate what you want to say into simple concepts that can evoke strong emotions.

As applied to politicians, these principles require you to learn as much as you can about their current beliefs and attitudes toward persons with disabilities.

# Understanding the Legislative Process

*Nearly all legislation is the result of compromise*

**Speaker of the House**
**Joseph G. Cannon**
**1923**

To be good at advocating your state legislators, and the United States Congress, you should understand the rules under which they work. This is not difficult, because once you get past a little technical vocabulary and the customs based largely in parliamentary procedure, the legislative system makes sense. Learning how the process works is easy because many people are interested in it, and hence, there are many sources of information and help.

Each state legislature will have its own particular rules, staffing system, committee structure and calendar. But they all have much in common with each other and with the United States Congress. What follows is an outline of the federal system for your background information. To learn the particulars in your own state, ask until you find a good informant or a good publication that will explain what you need to know.

# How a Bill Becomes Law

Most bills are introduced because of constituent interest. Very few bills are introduced that will not be popular with at least one constituent group. Largely to keep constituents happy, many more bills are introduced each session than ever become law.

Laws begin with a good idea. The idea is then translated into technical language by a legislative drafter. Any Member of either chamber can introduce a bill. In the House it is referred to as "dropping it into the hopper" (literally, the name of the box into which bills are dropped).

The bill is assigned a number, prefixed with "H.R." in the House and "S." in the Senate. When it is printed, it will also carry the names of the original sponsors, although additional Members may sign on as sponsors any time.

The bill is then referred to the appropriate committee(s). This referral is technically considered the "first reading." It is in the Committee structure that the substance of the bill comes under closest scrutiny, and where the large majority of bills die.

If a bill's chances for passage are considered good, a frequent next step is a request for comment by interested government agencies. The committee chairman may assign the bill to a subcommittee or it may be considered by the full committee. Hearings may be held on the bill; they can be open to the public, closed, or both.

After hearings and a vote, the subcommittee can sit on the bill or refer it back to the full committee with recommendations for action and for any amendments. This is called

"ordering a bill reported." The full Committee can then "mark up" or make amendments and vote on the measure. Or it can "kill" it through inaction. If reported back to the full House or Senate, the bill will be put on a calendar that will affect how and when it will receive further consideration.

In the House, the Rules Committee controls the flow of legislation by issuing rules for floor debate. There are technical ways to end-run the Rules Committee, but it exercises considerable power. It will decide whether amendments will be entertained (debate under an "open rule") or not ("closed rule"). The length for debate in the House varies, but is always limited. Debate in the Senate is usually unlimited, although a filibuster can be halted by a three-fifths majority vote on "cloture. "

A bill can be voted on many times, not just in subcommittee and full committee, but often on the rule for it and usually on any amendments considered on the floor of the full chamber. Amendments can even be amended. After amendments have been voted on, a motion may be made to recommit the bill to committee. If a bill survives this motion, it is "read for the third time", and a vote is taken on final passage. In the full Senate, a vote can be by voice (uncounted), by standing (counted but not recorded) or by recorded roll call. In the House, recorded votes are done electronically.

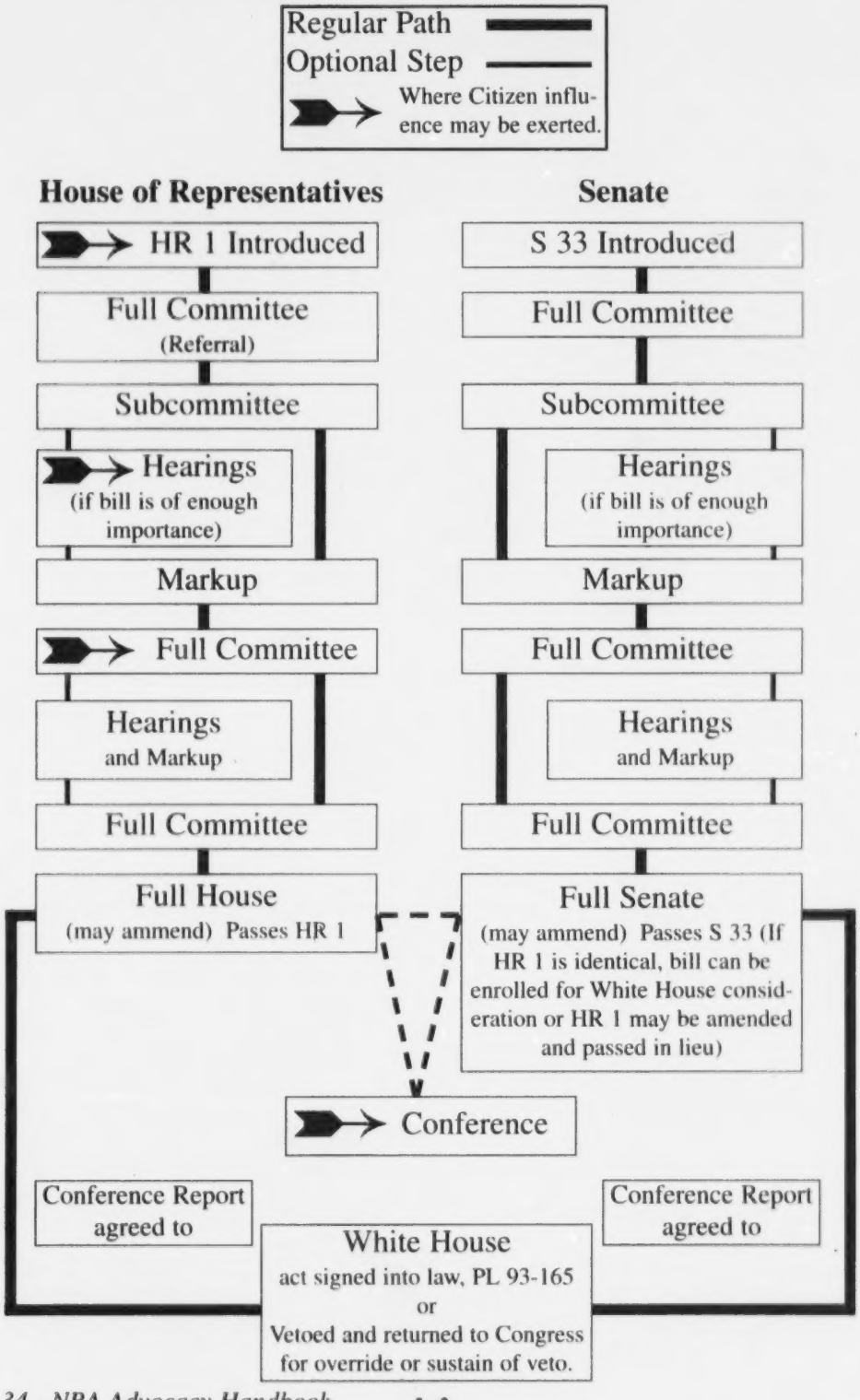
If passed in one chamber, the bill is sent to the other. There it can be passed as is, sent to committee, rejected, ignored, or passed with substitute language. If the opposite chamber basically alters the bill submitted to it, the versions from each house are "sent to conference". There, conferees from both chambers try to work out the differences between them through compromise. This can be a long, drawn-out process, and sometimes bills die in conference. However, when agreement is reached, a conference report is prepared

that embodies the compromises, and the conference report is voted on by each body. Approval of the report constitutes approval of the compromise bill.

After the same bill has been passed by both chambers it is sent to the President. He can sign it, thereby enacting it into law immediately. If he does not sign it and Congress is in session, it becomes law automatically after 10 days. If he does not sign it and Congress is not in session, it dies after 10 days ("pocket veto"). He can also veto it by returning it to Congress within 10 days with a message stating his reasons. A recorded two thirds vote of all present (and they must equal at least a quorum) in both houses is required to override a veto. Otherwise the measure is dead.

It is obvious why it is so much easier to kill a bill than to pass one. The rules that govern Congress can be changed, but most of the time they operate to keep the pace of legislation slow and deliberative.

## A Typical Journey for Legislation in Congress



# Steps For Success

*Don't call the question unless you've got the votes.*

**Congressman Dick Armey (R-TX),**
**House Majority Leader**

Do not become mired in the details of the legislative process. It is more important that you prepare your materials, organize your coalition, locate and enlist the commitment of your legislative champion. These are the things that only you can do. The members who support your issue and their staffs will help with the legislative details.

You should carefully monitor the many different places your bill could die. You may also have to serve as the bridge between the two legislative chambers, where your tactics may radically differ. In some states, each house is under the control of a different party. Even when controlled by the same party, communication between them may be sparse. Often some of the best information a good advocate can offer is about the other chamber's activities.

Meet with or call your legislative champion frequently to find out what he or she needs you to do. Arrange for as many other members as possible to be contacted by their constituents - in person, by letter or by phone - in support of your measure.

Identify and target key committee members and important swing votes. Organize small advocacy teams - no more than three or four carefully selected persons who come from the particular member's district, who are known by him or her or who will be considered to be important — to meet and work these key members.

Prepare packets of one-page fact sheets and background materials that you can leave behind. These materials should introduce and explain your organization and/or your coalition. They should lay out the facts about persons with disabilities, and the arguments for the specific issues you are addressing. Keep track of your measure's progress through the system. Timing is very important. Debrief your troops constantly. Remember that things happen quickly during short legislative sessions. Keep a running tally of your supporters and opponents so that you can direct your efforts most efficiently.

Always keep your eye on the opponents of your bill. While you work for passage of your own bill, you may have to oppose rival legislation that would negate your efforts.

# Legislative Hearings

You should work hard to get legislative hearings scheduled for your bill as it winds its way through the committee structure. Hearings are sometimes even held on issues for which there is no pending legislation, though this is less common.

Hearings function to create a public record. They are almost always tightly controlled and well orchestrated; seldom are any surprises sprung at a hearing. Nevertheless, they are often attended by the press, and they present an excellent opportunity to advocate your position, both directly to the key policymakers and indirectly through the media. Hearings also serve as an important rallying point and reinforcement for your hardworking supporters.

A legislative champion must arrange the hearing. Working with him or her, you should plan the hearing to demonstrate as broad a base to your support as you can muster. Draw on your advocacy network for persons with disabilities and coalition, and your broader NRA contacts. Look to your local or state universities for experts in rehabilitation who might lay out the issue from a medical, research, or scientific point of view. If you cannot get these key individuals to testify, see if they will submit short written statements for the record in support of your bill, or at least letters of support.

If you have never seen a hearing, try to attend one that is held before the same committee as will hold yours.

Work hard to prepare your supporting witnesses for their testimony. Help them frame their message in terms most supportive of your position. Unless they are seasoned veterans of legislative hearings, rehearse their testimony with them, and practice a question and answer dialogue like the one in

which they might become engaged with members of the committee.

It is sometimes difficult for academics to avoid technical language. Help your witnesses understand that committee members may have very little knowledge of rehabilitation, and might be put off by jargon. Witnesses must always show deference, and never speak down to elected officials. But witnesses should use clear, direct and simple language that, if picked up directly by the press, could convey their message to a broad general audience.

At the hearing, witnesses will probably be asked to limit their oral testimony to three or perhaps five minutes. This is a request you must honor. Your written testimony, which should be prepared in multiple copies for distribution to members of the committee and the press, can be longer, and can include much of the background and supporting information that you will not have a chance to present orally.

For highest impact, your oral statement should not be simply a reading of your written statement. In fact, your oral statement should not be read at all, but delivered from the heart, directly to the committee members as if they were guests in your living room.

You want the committee members to get to know you and your NRA organization during this hearing.

Speak from experience in the same way you would in a conversation with a friend. You want these members to fully understand issues related to people with disabilities and to feel anxious about correcting the current wrongs.

The only exceptions to time limitations on oral statements are if members of the committee ask you questions and engage you in a dialogue. This is exactly what you want to

happen. It might reveal misunderstandings they have, and give you the opportunity to correct them. It can increase the members' involvement with, and hence commitment to your issue. And it will build a longer record. Remember, if these members like you, your organization and your coalition, they will want to work more with you in the future.

Do not feel compelled to answer any question that you do not think is proper or on point. If an irrelevant question is asked, try to steer the conversation back on course with a polite rephrasing. Also, never be embarrassed if you are asked a question to which you do not know the answer. Rather, offer to get the information the questioner seeks and submit it for the record. Then be sure to follow through.

Begin with your main point and stay with it. If opponents of your bill have testified before you, use your testimony to rebut their most damaging points. If they will not testify until later, anticipate and deal with their opposition.

**When You Testify Before a Legislative Body**

From time-to-time you may be called upon to testify and/or write testimony. The purpose of testifying before a congressional committee, subcommittee, or state legislative committee is to present the views of NRA and its divisions to the elected officials concerned with new legislation or in developing amendments to current laws. Testimony may also be given at state or federal advisory committees. Before preparing testimony it is important to consult with others involved with the topic under consideration as well as with existing position papers and reference material.

**Identifying Testifiers**

Because the need to testify may come up with limited advance notice (sometimes as little as 7 days) it is important

to have a list of persons who would be willing and able to prepare and give testimony. In some cases the testimony may be written by one individual but presented by someone else.

**Tips To be Used for Testimony**

The following tips would be reviewed for usage when preparing and testifying before legislative or advisory committees.

1. Identify yourself, and, if applicable, the organization you represent.

2. State your position for or against the proposed bill or action.

3. Summarize your recommendation first and then add an explanation.
   Include answers to the following questions.

   a. What is your special interest? If testifying as an individual, explain why the proposed bill or administrative rules or action by a governing body would affect you. If representing a group, explain the group's interest and how you know other members of the group share the opinions expressed in your testimony.

   b. How did you arrive at your conclusions?

   c. Who will benefit or who will be hurt?
   Include the following information:

      I. Outline of the problem(s) as you see them.

      II. Solutions you think would be acceptable, and alternatives to proposed solutions with which you do not agree.

III. Mention good things you see in the subject of the meeting.

IV. Use statistics, charts and graphs when relevant.

V. In general, testimony should be brief (around 5-10 minutes), stimulating and overstated in order to excite and energize the legislators about needed programs or changes.

VI. Avoid attacking other groups, organizations or specific disability categories. This could backfire and have the reverse effect and lower your credibility.

4. Sum up your position at the end.

5. Have enough copies of your testimony available to give to each legislator and to the press.

6. Avoid: cliches, excessive wordiness, vague generalities, or flattery.

7. Be clear, concise, and brief. Include examples if relevant. If pertinent, explain how present laws or procedures would be affected by proposed bill or procedures.

8. By all means, use plain English and stay away from jargon used in our field. If you must use a word or phrase that is uncommon, be sure to explain it.

To help understand the art of testimony, it is suggested that you attend at least one hearing at any level of government, review the written testimony given by others and this should better prepare you for the time when you will be called upon.

# Letter Writing

A personal letter is an effective way to contact legislators or public officials. Legislators and public officials are very attentive to the views of their constituents. They keep track of the number of letters received on any given issue. Following are a few guidelines to help you write an effective letter to your state legislator or public official:

Address your letter properly with your legislator's or public official's full name and correct spelling. Suggested addresses and salutations:

U.S. Senator:
The Honorable (full name)
U.S. Senate
Washington, D.C. 20510
Dear Senator (last name):

U.S. Representative:
The Honorable (full name)
U.S. House of Representatives
Washington, D.C. 20515
Dear Representative (last name):

Governor:
The Honorable (full name):
Governor
State Capitol
City, State, Zip
Dear Governor (last name):

State Senator:
The Honorable (full name)
State Senator
State Capitol
City, State, Zip
Dear Senator (last name):

State Representative:
The Honorable (full name)
State Representative
State Capitol
City, State, Zip
Dear Representative (last name):

# Tips on Writing to Legislators and Public Officials

- Do not use form letters.
- A typed letter is not always preferable. However, make sure your letter is legible.
- Use a complete return address on the envelope and in the letter.
- Keep letters short and concise.
- Identify your subject clearly in the first paragraph: include bill numbers and legislation.
- Use titles, if appropriate.
- Give reasons for your position. If you have specialized knowledge, share it with your legislator.
- Be constructive. Admit that problems exist and suggest alternatives.
- Request a reply from your legislator outlining his views and intended action.
- Keep letters to one subject to avoid confusion.
- Be reasonable. Do not ask for the impossible.
- Do not assume that your legislator knows as much as you do on a particular subject.

- Don't be negative. Be constructive in your suggestions or criticisms.

- Write your letter when the bill is in committee or when you receive a call for action from the NRA Office.

- Avoid stereotyped phrases and sentences that give the appearance of a form letter.

- Letters from personal friends of the legislator often receive priority. Use board members and other contacts effectively.

- Sign your letter over your typed name, if appropriate.

- Remember to write a letter of appreciation when you feel your legislator has done a good job or when he/she has been particularly responsive to concerns you have expressed.

- Send a copy of your letter and response to the NRA Office.

# ELECTRONIC MAIL (EMAIL) AND FACSIMILE (FAX) MESSAGES

Accurate, up-to-date, almost "instant" communication has become vital in this emerging "information age". Not only has the ability to research issues improved, so has the ability to send instant messages to legislators.

Within the past 10 years, communication in the United States has taken a quantum leap. Almost every legislator, both at the national level and at the state level, now has access to a fax machine. While they may be reluctant to admit it, most legislators or their staffs also have access to an online computer.

Some legislators are slow to warm to the cyber (computer) revolution happening around them, while others embrace it wholeheartedly and use it extensively. Your job is to find out which legislators use computers and which ones abhor them.

Some Members of Congress get as many as 10,000 communications each day! Your job is to make your communication stand out among those 10,000 messages.

Do not expect an instant response from an e-mail message or from a fax message, while it may be read fairly rapidly, it still takes a bit of time for a response to be formulated. Some offices have computer programs that automatically forwards a standard uniform message acknowledging your communication. Because of the emerging technology, some members discount messages to them sent by email and some just plain don't have a computer savvy staff to deal with a flood of email messages. However, with the popularity of the medium, the low per-message cost, and ease of use, this should change fairly rapidly -- especially with more and more

Americans entering the cyber revolution. Just keep in mind that Congress is over 200 years old and while it eventually adapts -- it does so slowly.

Sometimes "instant" communication can have serious drawbacks. BEFORE you send your message, take some time to make sure it's accurate and it's what you want to say. Make sure it's appropriate. Of course, you should NEVER threaten or intimidate your legislator or anybody else for that matter. Some people have the problem of talking too much in real life and extend that problem either to email or fax messages. The good rule of thumb is -- don't send anything you'll be sorry for at a later date (even if that later date is tomorrow or ten years from tomorrow). Just because you save a stamp with these types of communication, it doesn't mean you have to include an encyclopedia of many volumes of information with each message. Again, to increase the likelihood of having your message read, keep it positive, concise and to the point.

# TELEPHONE CALLS

- If timeliness is critical, don't write - telephone.
- Do not expect to be put through to your legislator when you call. They cannot talk to every constituent. The staff is there for the purpose of listening to constituents and reporting to the legislator.
- State your interest clearly and briefly to the receptionist and you will be put through to the appropriate staff person.
- At the outset, restate your name, town, and the agency or organization that you represent (i.e., NRA, division, chapter, etc.).
- Outline your concerns in a brief, yet orderly manner.
- State your reasons for support or opposition to the issue.
- Ask clear and precise questions.
- Do not keep the person on the phone for more than five or ten minutes. If you have additional material to send, tell the staff person to expect it.
- Always try to follow up your phone call with a letter.
- Request a follow up from the office with the legislator's position on the bill.

# Continuing Communications

Strive to develop a continuing communications relationship with your legislator and his/her staff. This will counteract the legislator's possible impression that he or she hears from you only when you want something. Consider supplying information about disability issues throughout the year. If your information is consistently useful and dependable, the legislator will be encouraged to rely on it.

## Other Methods of Getting to Know Your Legislators

The people who serve in our legislatures are usually reasonable people who will respond favorably to a logical and reasonable approach. Legislators are influenced not only by rational argument, but also by pragmatic concerns of politics, i.e., votes, party loyalties, etc.

In addition to the methods described in the earlier sections of this handbook such as letters phone calls, emails, and faxes, the following methods should also help in influencing legislation favorable to persons with disabilities and rehabilitation in general.

### a. Attendance at hearing

Even if you are not testifying, attendance at relevant hearings will have an effective influence on legislative votes. The mere physical presence of impressive members of NRA could have critical impact on the outcome of getting important legislation passed.

### b. Political receptions and dinners

Meetings of this type at all levels of government are invaluable in getting to know legislators as well as their

staff aides. When appropriate you may want to give an award (usually a plaque) to a legislator or a staff member for his or her efforts on behalf of rehabilitation. Be sure to take pictures of the legislators and publish these in newsletters, journals, etc. In addition, a good turnout of NRA members for a dinner, reception, etc., demonstrates a show of strength and a high level of interest in rehabilitation matters.

Dinners may be handled in a variety of ways: you might have one legislator as the main speaker or you may have several officials where a particular bill or rehabilitation issues can be discussed. You might also consider general rehabilitation issues at such a meeting. In any event, a banquet, dinner, etc., is an excellent opportunity to interact on a one-to-one basis with legislators in a pleasant environment, removed from the formal atmosphere of the U.S. Capitol or State Capitols.

**c. Speaking engagements by legislators**

Invitations to speak to groups of constituents are usually welcomed by legislators, since such visits provide high visibility which is necessary in political life. Both legislator and the constituents get a chance to exchange views. This type of event allows NRA members to express needs and their positions on specific legislation. Once again, good preparation for any meeting with an elected official or officials is essential. NRA members should clearly know their agenda. If a legislator should ask for information that is not available at the dinner, be sure to follow-up within a few days with the requested materials.

Finally, have patience! Advocacy is usually a deliberate, pains-taking process.

# The Legislative Workshop

The best method for preparing people to advocate for rehabilitation policy interests, is to hold a legislative workshop or a series of workshops tailored to meet specific national or state oriented activities. Three types of workshops are briefly described below:

### 1. The Basic Legislative Workshop

As the title implies, this is the type of program that reviews the basic information needed to prepare an NRA member to become a grassroots advocate. In addition, this basic session should help motivate and stimulate interest in the person about the importance of the legislative process in serving persons with disabilities in rehabilitation. This later fact cannot be given enough emphasis.

The Format of a Basic Legislative Workshop

This handbook can easily serve as the basis for this type of legislative workshop. Each section has useful guidelines and tips for use by NRA members at all levels of government.

It is suggested that the workshop leader have some real experiences in grassroots advocacy. In addition, the program should feature a legislator or legislative staff person as a speaker or participant. This approach will sustain interest as well as add credibility to the workshop.

At the basic workshop (and all other types of workshops to be described in this handbook), the following form should be used to ascertain the NRA member's potential for involvement in legislative matters. This form should be sent to workshop participants in advance of the program

and returned to the workshop leader prior to the meeting. The information will help the leader ascertain the level of involvement with legislators; as an aid in developing strategies; and how to best utilize these individuals in establishing or maintaining a legislative action committee.

**Legislative Information Form**

1. Indicate the names and telephone numbers of the following elected officials:

   National level: Your two U.S. Senators

   _____

   _____

   U.S. House of Representatives (from your congressional district)

   _____

   _____

   Be sure to list the Washington, D.C. telephone number and the home office telephone number.

   _____

2. Indicate the names of the State Senators and Representatives from your home state and districts.

3. Check to see which committees/subcommittees your elected officials serve. It is especially important to know which legislators are on the committees associated with rehabilitation, education and health.

4. Note the names of any legislators with whom you are close personal friends, business friends, or ties to the legislator through another friend or relative.

5. Develop a list of NRA members that you could call upon to assist with telephone calls or letters to legislators.

6. List any coalitions that you currently are associated with as it concerns rehabilitation health, or other issues.

7. Have you ever held political office? (If yes, describe.) This format as shown above can be expanded to meet individual state needs. The information can also be useful in a brief discussion on developing key contacts in government.

**2. Special Orientation Workshop**

In this type of workshop the focus might be on any issue or set of legislative initiatives current or pending at any level of government. In this instance, a speaker or panel could be used to inform and discuss the pros and cons of the issue. The workshop agenda could also include the development of new, or different language for the bills under scrutiny.

The conclusion of this workshop could include several resolutions about the bill that should be delivered to the appropriate members of the House and Senate.

Such a workshop might also focus on action steps or strategies to be taken on behalf of a specific bill.

**3. A Workshop Combining Basic Information as well as a Special Orientation to Some Current Issue**

This type of workshop combines the elements of both 1 and 2 of the workshops described above. For this workshop extremely careful planning is necessary for obvious reasons. It is assumed that if giving basic information, you are dealing

with newcomers to advocacy. At the same time, you may also be discussing plans and strategies for developing a response to a new Senate bill.

In this case, it is important to move slowly with the information to avoid fear and confusion as to the roles to be played by the workshop attendees. Be sure to have on hand in the audience at least a third of the audience with some hands-on experience with some aspect of grassroots advocacy. This combination of persons will provide for more meaningful discussion and help build needed confidence in the less informed members.

# STATE ADVOCACY

*No political dreamer was ever wild enough to think of breaking down the lines which separate the States, and of compounding the American people into one common mass.*

**Chief Justice John Marshall**
**1819 (*McCulloch v. Maryland*)**

Because of the recent moves by federal legislators shifting the responsibility for the administration, policy making and spending decisions of some federal programs to the State and even the local levels of government, advocacy at both the State and local level has become much more vital. In fact in most States, advocacy at the State level can be considerably more direct and have far more impact than advocacy at the federal level.

## State Government Structure

The structure of every State government is by tradition based on the foundations set forth by the founding fathers in implementing the federal government through the United States Constitution. While the U.S. Constitution outlines the federal government structure, it does not address State government organization thus leaving State government structure (thru implied powers) to the individual States.

State Constitutions vary widely and usually reflect the political events that happened at the time that particular State became part of the United States. Many of the thirteen original States have revised their State Constitutions again reflecting the events happening in the United States during the revision(s). Nonetheless, as with the Federal government, all State governments are divided into three branches

- Executive, Legislative and Judicial. The Governor is the Chief Executive of the State with various executive branch agencies filling out the Executive Branch. The Legislative Branch is represented by the Legislatures. Forty-nine of the fifty States have a two chamber (bicameral) legislature - an upper house and a lower house. Nebraska is the only State with a unicameral (one chamber) legislature whose members are elected in a nonpartisan manner. The Judicial branch is represented by the State Supreme court and all lesser State courts. However, unlike the federal government, the jurisdictional lines between the Executive and Legislative Branch agencies are less clear. Many times there are overlapping jurisdictions and agencies may serve more than one executive authority.

**Membership of State Legislatures**

State legislative bodies for the most part have remained citizen legislatures. The State Legislatures in virtually every State remain in session only part of the year ( those State legislatures meeting throughout the year are - Illinois, Massachusetts, Michigan, New Jersey, New York, Ohio, Pennsylvania, and Wisconsin) and a majority of State legislators usually holds a full-time job in their communities in addition to their legislative duties. Many times service in a State legislature is considered training for service either as a higher State official or as a member of the United States House of Representatives or U.S. Senate.

In some States, the Governor plays an integral part in the State legislative process - in other States, the Governor remains far removed from the Legislature.

## Strict Time Deadlines

The most active times in any legislative body are at the very beginning of the legislative session when there is a rush to introduce legislation and again at the end when there is a rush to meet time deadlines prescribed by State law or the State Constitution. Because of the limited time most legislatures are in session, time deadlines are strictly observed. Time deadlines can include the following: a date certain when legislation must be introduced; a date certain when all Committee action must be completed on legislation; a date certain when Chamber action must be completed on legislation so it must either be sent to the other Chamber (usually called the crossover date) or be sent to the Governor for final action. More recently, legislatures have scheduled additional legislative sessions after the Governor's Constitutional period for consideration of legislation. These are called veto override sessions and are usually extremely short — most likely one day to a week in duration.

## The Accessibility Factor

Due to the fact that most State legislators have full time employment in their local communities in addition to their legislative duties, State Legislators are extremely accessible. It is fairly uncomplicated to talk with a State Legislator by telephone or make an appointment with a State Legislator to discuss issues of concern. Major input received by State Legislators comes from special interest lobbyists. Consequently, when State Legislators hear from their constituents on legislative matters of concern, they are highly receptive.

## State Campaign Financing - Rules and Regulations

It is vitally important that all non-profit groups recognize that participation in partisan political campaigns (Federal, State, or Local) as a group either financially or with "in-kind" contributions may compromise the tax-free status of a non-profit organization.

However, individual members or officers of a non-profit organization - AS INDIVIDUALS - are free to make "personal" financial or "in-kind" contributions to any candidate.

In some States the definition of "partisan political activity" could, in extreme cases, be extended to causes or issues. Nonetheless, a general rule is that if the activity is done as a personal activity by an individual, it is part of their federally protected right of freedom of speech (1st Amendment, U.S. Constitution). If there is a question as to the legality of the (political) activities of a non-profit group, professional legal assistance should be sought.

In comparison to federal campaign laws, most States have extremely "relaxed" campaign finance laws and regulations - if they exist at the State level at all. Federal campaign financing regulations always supersede State regulations during a FEDERAL election (i.e. election of members of the U.S. House of Representatives, U.S. Senate, President and Vice President of the U.S.). Federal regulations do not supersede State laws and regulations in STATE elections - UNLESS the State is still under federal supervision of the U.S. Department of Justice in accordance with the provisions of the (federal) Voting Rights Act.

## Know Your State Representatives

Individuals who serve as State Legislators are NOT the same individuals serving as federal representatives. Much confusion can come when States have named the lower chamber of the legislature - the House of Representatives and/or the upper chamber the Senate - since these names are synonymous with Congress (the national legislature). Learn who State Legislators are at the same time as Federal legislators. While there will be some overlapping jurisdictions (some programs administered by the States are funded by the federal government), try to address federal concerns to federal legislators and State concerns to State legislators - it will save time as well as the frustration of being passed from office to office until the office with the proper jurisdiction is reached. Don't hesitate to contact any elected official to express views on issues. Remember, the only way legislators - at any level - know constituent feelings on any issue is when they are told those views by their constituents. Be concise, but don't assume they know the full ramifications of an issue all the time. Legislators have hundreds of issues coming before them for review. In State Legislatures, find out what are the exact time lines and keep them in mind when contacting legislators. In other words, don't contact a legislator to support or oppose an issue after the legislative body has dealt with that issue - unless it is to thank the legislator for the legislator's efforts.

## Methods For Advocating on the State Level

Techniques for advocacy on the State level can be as varied - some examples and suggestions follow.

Some groups feel that their legislature is so sophisticated, they need the expertise of a paid lobbyist. However, keep in mind that ALL legislators like to hear from their constituents - even if a paid lobbyist is hired. It is always necessary for indi-

viduals to contact their own legislators expressing their specific feelings on issues. Hiring a paid lobbyist doesn't absolve an individual of their duties of good citizenship.

One State group breaks the State down into subchapters to more easily deal with legislators both at the State and Federal levels. The Subchapters have their own group leaders, who for a set period direct the activity of those individuals wishing to contact legislators.

It has been reported that in some States, State employees and employee groups are prohibited from contacting their legislators. In these cases, organizations have become extremely creative and have relied on private entities for avenues of direct contact. Keep in mind that if a State employee is prohibited from contacting a legislator, the U.S. Constitution protects a person's right of Free Speech to express their views to their legislator as an individual citizen. Consequently, any individual may contact a legislator as a private person to express their views.

Groups have also found it to be extremely effective to have a legislator tour a vocational rehabilitation operation in their local area. They make sure that legislators talks with VR clients and get their reactions to the VR program. Always make sure the operation shows that public monies are being spent wisely and with positive results to the community. Often times, successful visits can make a legislator a lifetime advocate for VR programs and for programs for the disabled. It is also a great photographic opportunity for the local press (don't forget to invite them).

Many State groups hold Chapter, Regional, and Divisional governmental awards ceremonies for legislators who have been strong advocates for VR programs.

Always send thank you notes - for visits - for telephone time - for votes - for attending seminars - for meetings. It is not only proper etiquette, it is an excellent manner to remind the legislators that they are being thought about and that someone is watching the way they vote.

Chapters are beginning to establish governmental affairs /Chapter web (Internet / World Wide Web) sites. This can be enormously effective if the web site is maintained properly. It allows the governmental affairs operations to be open to all the membership - so that information can be passed along rapidly in a cost-effective manner. However, members must in turn take the responsibility to periodically read postings on a web site and take the requested action(s).

Governmental Affairs seminars are wonderful places to showcase a State representative and introduce that person to VR programs. Make them a part of panels on key subjects important to VR. Allow them to interact with VR clients - so they can see that the program is working and working well.

Several States have kept clients informed as to the status of legislation impacting VR programs. Clients and their families in turn have written letters or visited their legislators informing them of the positive aspects of VR programs. This method gives the legislator a broader prospective of the effectiveness of the program.

Create positive publicity for VR programs. This can be done by either writing letters to local newspapers explaining incorrect perceptions of VR programs by the newspaper - or furnishing the newspaper with factual stories about the positive VR outcomes. A word of caution - respect your clients right to privacy by asking their permission before using any names. Once a positive story has been printed in a newspaper - cut it out and enclose it with your correspondence to

your legislator. It is remarkable how much more significant a positive result can be after it's profiled in a newspaper article.

Always let candidates for office as well as current office-holders know of feelings on issues. A campaign is not only a place where a candidate tries to win votes - it is a time when a candidate formulates opinions on issues based on the reactions of constituents.

As in all elections, an individual is of great value to a candidate if they are registered to vote. However, the biggest prize of all is an individual who exercises that right by actually casting a ballot.

# How To Access and Use the Media

Media advocacy is the strategic use of mass media as a resource for advancing social or public policy change. Like advocacy in general, media advocacy is an art. Most of what even the great masters of media advocacy have learned they discovered through experience.

The limitations of this handbook apply to media like they apply to advocacy in general. That is, this is not a cookbook; it cannot offer specific formulas for solving the problems you will encounter. But it can suggest approaches, ways of using the media as a resource and an important element of your advocacy campaign.

Media gatekeepers are much like policymakers. Both have limited time and attention, so both must be lobbied effectively to get what you want from them. Don't ever wait to be contacted by members of the media. When you want them to cover a story, take an activist approach. As with politicians, the easier you can make a reporter's job, i.e., the more work you can do for him, the better. This is especially true when it comes to framing your issues. Work hard to put the bare facts of your story into the framework or perspective in which you want them viewed.

Always remember that media is a means to an end, never an end in itself. The media can sometimes function like a mind-altering drug; the quest for coverage can overpower the well meaning advocate and cause her to lose sight of her immediate and long term goals. Remember that bad coverage can do more harm than no coverage at all. Do not get caught up in the power of the media. It is only one of the many weapons you will use in the battle for reform. The emphasis is on using it, not letting it use you.

# Media Strategies

A media strategy is a plan for using the media to accomplish a specific goal. To be successful, a media strategy must be carefully thought out and tailored to accomplish its goal. In particular, the strategist must know:

- **What the goal is, in precise and realistic terms;**
- **What the message is, in clear, simple terms;**
- **Who the target audience is;**
- **What outlets are best to disseminate the message and reach the target audience;**
- **What the audience should do after they have heard the message; and**
- **What assistance will be needed to accomplish the goal.**

As in all successful advocacy interventions, a good media strategy requires you to stick to a single central theme. Make your total message revolve around it. Keep the theme simple and appealing.

# Media Relations/Public Relations

You should form personal relationships with reporters that will be mutually beneficial. You need them, but they also need you.

Become as familiar with the many different media outlets in your area as you can. Learn their format, style, and the demographics of their audience.

Compared to electronic reporters, print reporters:

- **have more time;**
- **are able to get more deeply into their stories;**
- **are more anonymous; and**
- **make much less money**.

It is best to contact members of the media when you do not want something specific from them. (For example, you could arrange a meeting with the editorial board of your local newspaper before your issue gets hot.) Take the time to introduce yourself, your organization, your cause. Let them know that you are an expert on your issues and become a continuing resource for them. Build the mutual trust and respect that are essential to all successful relationships.

But always remember that reporters' interests will not always converge with yours. They are after stories, not social goals. Therefore, it is your responsibility to package the information that you give them in a way that serves both your and their needs. Don't count on anything you say being truly off-the-record. If you never want to see it in print, don't say it.

As in political advocacy, a good rule of thumb in media advocacy is that there are no permanent friends and no permanent enemies.

Keep track of the reporters on your "beat." Learn all you can about who makes the decisions in each media outlet and how. Newspapers have reporters, but they also have section editors, city editors, national editors, feature editors, managing editors and publishers. Broadcast personnel include assignment managers, planning editors and executive producers. The key people in each outlet are worth meeting in person.

Never, never lie or mislead a reporter. Information is the commodity you are marketing, but credibility is what you must use to sell it. Exaggeration is not necessary when it comes to issues regarding persons with disabilities.

# Accessing the Media

Media is a limited resource. Access is reserved for those stories which media managers deem to be newsworthy - i.e., significant, interesting and new. Therefore, advocates must look constantly for new ways to push their issue. These opportunities for access are called news "pegs," "angles" or "hooks. "

Factors that get people to pay attention to a news story are the traditional criteria for news:

- **Timeliness. News, by definition is new.**
- **Proximity. The event is within the audience's perception of their community.**
- **Consequence. The news will affect the viewer/reader.**
- **Human interest. An appeal to emotion or an illustration of a universal truth.**
- **Conflict. A clash of opposing interests.**
- **Prominence. Such as associations with a celebrity or renowned figure.**
- **Unusualness. Something that has not happened before.**

Some other, nontraditional definitions of news are these:

- **Inoffensiveness. The media not only do not want to offend anyone, they want to avoid public complaint.**

**This gives vocal, mobilized segments of the public a disproportional amount of influence with the media.**

- **Congruence. If the information is too unusual, if it does not fit society's existing theoretical constructs, it will not sell.**

- **Brevity. Whether broadcast or printed, information has to be packaged into short bites and compete with the clutter of other bits of information.**

To be successful at media advocacy, you must remain flexible and responsive. Seize whatever opportunities present themselves to push your issues. In this sense, a media advocacy campaign is like a political campaign, in which candidates react constantly to unexpected events and late-breaking news.

You can piggy-back local coverage on national events, such as National Rehabilitation Week, but always try to give your story a local spin.

You will find more avenues to access the media by thinking of different ways to package your information. Hard news is what is reported on the front page of the newspaper and on the 6 o'clock news. Coverage of hard news is very limited, because hard news stories are tersely written. However, there are many alternatives to hard news coverage. These alternatives are called soft news. They include feature stories, human interest stories, individual profiles, and what is in the lifestyle section of the newspaper.

Do not hesitate to call a reporter if you think you have a good story. Remember that they are paid to gather news from informants like yourself.

You may want to consider other ways of accessing the media.

- **News Conference:** Hold a news conference only if you have hard news and cannot handle the story in any other way (e.g., through a simple press release). The fanciest trappings of a news conference cannot create or add to the substance of any story. The worst result is an event that no one attends, or one from which no one takes a story.

- Announce the conference with a news advisory (see below), but hold the important information for the event itself.

- **Feature a good speaker.** They should deliver a statement, but must also be prepared to engage in open dialogue with the press.

- Use good audio/visual materials.

- Distribute press kits at the event that include background information, biographies and other useful materials.

- **News Briefings:** Use a more informal news briefing when you have sufficient lead time (e.g., 30 days) before the news event, when the issue is complex, and when reporters would benefit from advance notice and good background information. Briefings can be held with individual reporters or small groups.

- There are also many different ways to contact the press on paper.

- **News Release:** Best for print media, with lots of lead time and limited in-house reporting resources. Should

be written so it could be reprinted directly or with few changes.

- **Tag Line:** Usually one or two short sentences attached to a recent photograph describing the actions and/or individuals featured. Immensely popular with local newspapers and almost always published by neighborhood newspapers.

- **News Advisory:** Less formal, not for direct reprint. Should be faxed or hand-delivered to apprise the media of an upcoming newsworthy event.

- **News or Feature Release:** Best for soft news or feature stories.

- **Tickler:** One-page, informal presentation of ideas or angles on stories that do not have particular deadlines.

- **Pitch Letter:** Used to feed an exclusive to a specific journalist who will be interested in the story

When you make initial contact by mail, follow up with phone calls. Say what you have to say in 30 seconds or less. (Remember that reporters are almost always under deadlines. )

Keep good records of your contacts with the press and their responses. You may want to contact them again.

The press loves to cover what other members of the press are already covering. Once you get a story into any media outlet, competitors in the same and in other media are likely to pick it up. Therefore, consider feeding an important story as an exclusive to a single reporter in exchange for prominent coverage the first round. Then help other media outlets find

new ways to package the same story.

Remember radio talk show hosts and local cable stations. They have commitments to their own communities and a lot of time to fill each day.

Be proactive. Don't just sit and wait for someone to call. Be assertive in accessing the media.

# Media Presentations

If you get scheduled to appear on a radio or television show, follow the same approach as in giving testimony in a hearing.

Before each show (live or recorded) and each interview, find out as much about the format as you can, especially how much time you will have. Learn as much as you can about the audience too. If you have the opportunity, assist the reporter in developing the questions you will be asked. Provide background information, including facts and figures that might be useful to the reporter (and to your own cause).

Keep language simple and direct. Don't use jargon. Jargon puts people off. Speak in short, clear, punchy (i.e., quotable) sentences. Pre-taped interviews will be edited, so points that are made in long, rambling paragraphs will be lost. Remember that much of what you say will be reduced to 15-second sound bites.

Make your most important point first. If you try leading up to it with background information, you may not get it in at all, or you may lose your audience in the meantime.

Be prepared with short well-phrased explanations of your main points, but be attentive throughout the interview so you can respond to what is being said.

Emphasize your major points by "flagging" or listing them. (Example: "The most important thing to remember is ...." "The three crucial conclusions are ....")

Maintain control throughout the interview. Do not feel compelled to answer a question if you don't like it. Rather, use

it as the opportunity to get your point across. Be ready to "reframe" questions that are off the mark.

Don't try to be a know-it-all. If you don't have the answer to a particular question, don't fake it. Instead, use the opportunity to make one of your main points, or, if time allows, offer to find the information the reporter wants.

Be patient, not belligerent; kind, not nasty; helpful, not argumentative. Let your expertise come across, but do not be haughty. The audience will not retain the facts and figures you present, but they will remember how they feel about you.

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# Glossary of Commonly Used Legislative Terms

***Act*** - technically, the designation of a bill after it has passed one house of Congress. Also used as a synonym for law. The term for legislation which has passed both houses of Congress and has been signed by the President or passed over his veto.

***Amendment*** - proposal of a congressman to alter the language or stipulations in a bill or act. It is usually printed, debated, and voted upon in the same manner as a bill.

***Appropriation Bill*** - permits the expenditure of the monies approved by an authorization bill, but not necessarily to the total permissible under the authorizing legislation. An appropriation bill originates in the House, and normally is not acted on until its authorization measure is enacted.

***Authorization Bill*** - legislation setting up or continuing programs; sets general aims and purposes and may set a ceiling for funding. Usually enacted before appropriation bill is passed.

***Bill*** - legislative proposal introduced in either house (until it has been passed by that House). Designated HR (House of Representatives) or S (Senate) according to the house in which they originate and by a number assigned in the order which they were introduced.

***Budget*** - document sent to Congress by the President in January of each year estimating revenues and expenditures for the ensuing fiscal year.

***Calendars*** - arrangements for scheduling legislative business.

**House:** Union-bills for revenue and appropriations
House-other public bills
Private-bills pertaining to individual or private Interests
Consent-controversial bills
Discharge-motions to discharge from committee

**Senate:** Legislative-all bills
Executive-items under advise and consent power

**Clean Bill** - after a committee has considered and revised a bill, they may rewrite it incorporating their amendments into a new or "clean bill". This bill is given a new number and is the committee's best judgement of superior sections in all versions.

**Closed Rule** - (House) prohibits the offering of amendments, thus requiring that the bill be accepted or rejected as reported by committee.

**Cloture** - a process by which debate can be ended in the Senate. A motion for cloture requires the signature of 16 senators for introduction and support of 2/3 of those present and voting.

**Committee** - a subdivision of the House or Senate which prepares legislation for action by the parent chamber, or makes investigations as directed by the parent chamber. There are several types of committees. Most standing committees are divided into subcommittees, which study legislation, hold hearings, and report their recommendations to the

full committee. Only the full committee can report legislation for action by the House or Senate.

**Committee of the Whole** - when the House sits as one committee to consider legislation reported by a standing committee before it goes to the floor; the committee debates and amends legislation. Requires only 100 members for a quorum.

**Committee Report** - written explanation and justification for recommendations submitted by committee to full chamber after the committee has scrutinized and decided to favorably report a bill. Used by courts, executive departments and the public as a source of information on the purpose and meaning of a law.

**Conference Committee** - a committee made up of members from both houses; purpose is to iron out differences between House and Senate versions of a bill.

**Congressional Record** - daily record of the proceedings and debates of Senate and House versions of a bill.

**Continuing Appropriation** - when a fiscal year begins and Congress has not yet enacted all the regular appropriation bills for that year, it passes a joint resolution "continuing appropriations" for government agencies at rates generally based on their previous year's appropriations.

**Expenditures** - the actual spending of money as distinguished from the appropriation of it. Expenditures are made by the disbursing officers of the administration; appropriations are made only by Congress. The two are rarely identical in any fiscal year; expenditures may represent money appropriated one, two or more years previously.

**Hearings** - committee session for hearing witnesses. At hearings on legislation, witnesses usually include floor spokesman for his party. Elected by party caucus.

**Pigeonhole** - shelving a bill without a final vote; usually refers to blockage by a committee; allows a bill to die by failure of a committee to act.

**Privileged Bills** - (House) bills which have precedence over normal order of business and do not require Rules Committee action; reports from Committee on Appropriations on general appropriation bills and reports from Committee on Ways and Means on bills raising revenue are privileged bills.

**Quorum** - number of members who must be present to conduct business; in the House it is 218 and in the Senate it is 51.

**Ranking Member** - member of a committee who has more seniority on the committee than any other member of his party. Usually used in reference to the most senior minority party member.

**Rescission** - an item in an appropriation bill rescinding, or canceling, funds previously appropriated but not spent. Also, the repeal of a previous appropriation by the President to cut spending, if approved by Congress under procedures in the Budget and Impoundment Control Act of 1974.

**Report** - both a verb and a noun, as a congressional term. A committee which has been examining a bill referred to it by the parent chamber "reports" its findings and recommendations to the chamber when the committee returns the measure. The process is called "reporting" a bill.

A "report" is the document setting forth the committee's explanation of its action. House and Senate reports are num-

bered separately and are designated S. Rept. or H. Rept. Conference reports are numbered and designated in the same way as regular committee reports.

Most reports favor a bill's passage. Adverse reports are occasionally submitted, but more often, when a committee disapproves a bill, it simply fails to report it at all. When a committee report is not unanimous, the dissenting committeemen may file a statement of their views, called minority views and referred to as a minority report. Sometimes a bill is reported without recommendation.

**Rider** - an amendment proposing substantive legislation attached to another bill.

**Seniority** - refers to length of uninterrupted service in Congress and specifically on a committee; criterion for determining committee chairmanships.

**Session** - normally, each Congress consists of two sessions, usually beginning in January and ending when Congress adjourns for the year.

**Standing Committee** - committee whose existence is permanent and continuing from one Congress to the next; there are 20 in the House and 20 in the Senate.

**Subcommittee** - smaller subject-matter divisions of a committee; facilitates specialization and division of labor.

**Supplemental Appropriations** - Normally are passed after the regular (annual) appropriations bills, but before the end of fiscal year to which they apply. Also referred to as "deficiencies".

**Suspension of the Rules** - in the House a 2/3 majority may suspend the rules and bring a bill directly to the floor: in the Senate, only a majority vote is needed.

**Teller Votes** - (House) taken in Committee of the Whole by counting congressmen for or against a measure as they walk down the aisle; (until the Legislative Reorganization Act of 1970, there was no provision for recording teller votes).

**Unanimous Consent** - usual way of conducting business in the Senate; after morning hour, majority leader asks unanimous consent to consider pending legislation; such requests are rarely objected to; also used in both houses in lieu of a vote on non-controversial measures.

**Veto** - action by the President if he doesn't approve a bill or joint resolution, he returns it with his objections to the house of origin and the bill may be reconsidered; must receive approval of 2/3 of both chambers to become law. When Congress has adjourned, the President may pocket veto a bill by refusing to sign it.

**Whip** - chosen by party caucus as an assistant to the floor leader; job is to keep in touch with all members of his party, discover their voting intentions and get them to the floor for a vote.)

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